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Broadcasting Jun 24

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60th Year 1991

TELEVISION / 50

Summer ratings dry spell has CBS, Fox, looking for relief

CABLE / 56

In first of three hearings on cable, competitors call for program access legislation

WASHINGTON / 55

Fin syn goes to court; Fox, CBS affiliates asking for court review

MEDIA / 59

BPME convention: Fox's Padden blasts network competition

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Vol. 120 No. 25 \$2.50

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 20814SRI AT8501 ZCZ
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 BETHESDA MD 20814

THIS WEEK

19 / UPFRONT IN A DOWN ECONOMY

With the prime time upfront about two-thirds sold, the three networks and Fox are expected to take in between \$3.6 billion and \$3.8 billion from advertisers. That represents a 10% to 16% drop from last year's prime time total of \$4.35 billion. Not all the networks are willing to endure double-digit decreases. ABC is said to be betting on an economic recovery and is holding back inventory for the scatter market. Fox also is not selling as much, although that may also have to do with advertiser uncertainty over Fox's new 52-week schedule. ABC is not the only one holding out for scatter. Many advertisers have not set budgets yet and may also wait for scatter, to avoid a repeat of last year when scatter prices were 15% to 20% off from the upfront.

20 / MONTREUX: 1991

Digital video compression for conventional and high-definition television, new digital videotape formats and cable digital services and other new technologies demonstrated at the 17th International Television Symposium and Technical Exhibition in Montreux, Switzerland, are rapidly changing television engineering. The six-day conference (June 13-18) included roundtable discussion on compression and HDTV for broadcasters and cablecasters, new equipment demonstrations



Montreux 1991: digital developments dominate show (page 20)

and first transAtlantic satellite transmission of General Instrument's DigiCipher. Japanese producers working with 1,125/60 HDTV format stole the show at the concurrent International Electronic Cinema Festival.

21 / NAB LAB

The National Association of Broadcasters joint board is exploring the possible establishment of a research and development facility to promote the state of the art in broadcast technology. Special radio and TV committees on emerging technologies, to be formed by next month, will plan the facility. An industry summit on new technologies is to be held at the NAB winter board meeting. The board also discussed digital audio broadcasting, FCC's "attic to basement" review of radio regulations and the retransmission consent provision in the Cable TV Consumer Protection Act of 1991 (S. 12).

23 / CARSEY-WERNER SYNDICATION

The Carsey-Werner Co. said it is creating an in-house syndication sales division, with Bill Cosby set to headline a new first-run revival of *You Bet Your Life* for stripping in fall 1992.

24 / NETWORK COST-SAVING MEASURES

Although broadcast network news coverage of the 1992 presidential elections is still in the earliest planning stages, there has already been some talk of reducing convention coverage as a way to cut costs, and it appears there will be more pooling of resources among the networks than ever before.

27 / ALL-NIGHT NETWORK NEWS

To date, most stations have relied on rebroadcasts of their late news and other news services such as CNN

Headline News and the All News Channel to fill the overnight time period. But that competition is about to intensify as ABC News and NBC News each prepare an overnight news service for possible launch by early 1992, and CBS News continues to consider a similar plan.

29 / SPECIAL REPORT: CHALLENGES OF RADIO SYNDICATION

Economic belt-tightening, format fragmentation and a prized baby boom bulge have led to mounting challenges within the radio program syndication business. This special looks at how networks and program suppliers are meeting these challenges with innovative sales efforts and value-added marketing techniques, and by developing programs that are broad enough to cut across format lines while still enabling a station to maintain its market image. Also: a profile of more than 60 syndicators—including national radio networks that offer a full programming menu, independent program suppliers that focus on specific formats and/or audiences and smaller companies that produce just one or two highly specialized shows.

45 / CABLE TAX DECISION APPEALED

The U.S. government will appeal a tax court decision won by Tele-

Communications Inc. last November. The question of whether cable franchises are similar to commercial franchises will be argued before the 10th Circuit Court of Appeals. The tax benefits at issue could, for the cable industry as a whole, total in the hundreds of millions of dollars.

46 / INDUSTRY FORECAST

Current economic weaknesses are masking basic strengths in the communications industry, according to the fifth annual Veronis, Suhler & Associates industry forecast. The five-year outlook predicts that revenue will rise at a compound annual growth rate of 6.8%.

50 / SUMMER TV

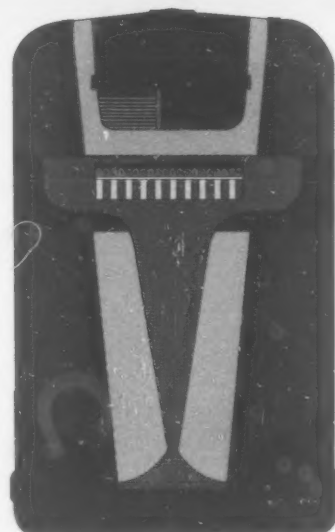
CBS and Fox are making aggressive moves toward scheduling original programming for this summer. Fox is expanding episode orders for several series to provide original episodes during the summer. CBS is again using the summer as a launching pad for new series, which, if they perform well, will return to the schedule later in the season.

52 / VIACOM TEST

Viacom Enterprises is testing three new shows this summer that the company hopes will help establish it in the first-run entertainment strip business.



(page 59)



Special Report: radio syndication (page 29)

53 / NBC-ITC DEAL

NBC expands its syndication presence in a deal with ITC Domestic Television to have ITC distribute *The George Michael Sports Machine*, effective Sept. 15.

55 / FIN-SYN BATTLE MOVES TO COURTHOUSE

Four groups—three pro-network and one pro-Hollywood—have petitioned three different federal appeals courts to review the controversial new financial interest and syndication rules.

56 / CABLE COMPETITION

Using the first of three video marketplace hearings to advocate "modest regulation until true competition can be demonstrated," Congressman Ed Markey (D-Mass.) heard home satellite and wireless cable interests call for legislating access to cable programming at fair prices.

57 / EFFECTIVE COMPETITION UPDATE

It is unlikely that the bottom line of cable

companies will be materially affected by the FCC's effective competition decision, which will bring between 18% and 34% of cable subscribers under rate regulation.

58 / CAN WE TALK?

Talk TV Network will premiere with 12 hours of live programming Sept. 16. Six hosts have been lined up to handle two-hour talk segments, beginning at 1 p.m.

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59 / PADDEN ROCKS BPME

Preston Padden, senior vice president, affiliates, Fox Broadcasting, criticized the competition during his keynote address at last week's meeting of the Broadcast Promotion and Marketing Executives and the Broadcast Designers' Association in Baltimore. Padden said he thinks "the real reason network scheduling meetings drag on for so long is that it takes time to figure out program moves best calculated to drive affiliate promotion executives crazy."

60 / BPME '91: PROMOTION AND THE BOTTOM LINE

This year's BPME-BDA speakers and panels focused on high-quality promotion in a low-budget environment. Attendance at this year's meeting was around 700, off slightly from last year.

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INDUSTRY FORECAST

Continued from page 40.

Jack Anderson Investigative, Almanac, Medical Minute, TV Tonight, People in the News, Consumer Focus, Commodity Focus, Hollywood Focus, Science and You and Your Money.

Vision Broadcasting Network, a New York-based producer and distributor of album-oriented rock specials, according to founder and president Floyd Vasquez, is developing *New York Breakthrough* as a showcase for up-and-coming rock artists and groups. Vasquez said he is confident the short-form (10 two-minute vignettes) and concluding long-form (live, three-hour special) *Breakthrough* formats will be cleared with top 100 market stations by summer 1992. Vasquez said the two-minute vignettes will be targeted for AOR stations, highlighting interviews and musical cuts from emerging rock musi-

cians. Those 10 vignettes, which will be distributed via compact disk, will air in two-week periods. The three-hour special will combine live musical events from New York via satellite, mixed with some prerecorded segments. Both programs will be offered on an undisclosed barter basis, said Vasquez, who founded Vision Broadcasting Network in 1988.

Los Angeles-based **Westwood One Inc.** produces and distributes news, information and entertainment programming distributed through the NBC Radio Network, the Source, Mutual Broadcasting System and Westwood One Radio Networks. The company syndicates a number of long- and short-form radio programs and specials, distributed via satellite, to 3,000-plus radio stations internationally. Short-form information features include *America on the Road*, *Dr. Joyce Brothers Report*, *Face-Off*, *First*

Light, *Joanie Greggains Health Minute*, *Larry King: My Side of the Story*, *Like Only Yesterday*, *Mature Focus*, *Money Magazine Business Report*, *News You Can Use*, *Offbeat*, *Science Update* and *Bruce Williams' Travel Corner*. Long-form information programs include *America in the Morning*, *Larry King Show* and *On the Garden Line*. Long-form entertainment features include *American Dance Trazz*, *Casey's Top 40 with Casey Kasem*, *Dr. Demento*, *Encore with William B. Williams*, *Future Hits*, *In Concert: High Voltage*, *In the Spotlight*, *Last Lennon Tapes*, *Off the Record with Mary Turner*, *On a Country Road with Lee Arnold*, *On the Radio*, *Pirate Radio USA*, *Scott Shannon's All Request Top 30 Countdown* and *Superstar Concert Series*. Among WW1's short-form entertainment programs are *BBC Classic Tracks*, *Casey's Biggest Hits*, *Country Comments*, *MTV News*, *New Gold on CD*, *Rock Calendar* and *Rock Report*. Westwood One also distributes a wide variety of special programs in virtually all radio formats.

RIDING GAIN

RADIO SPENDING UP AMONG SOME ADVERTISERS

Banks and financial service companies have increased their spending on radio in New York during the first quarter of 1991 by 34.2% over the same period last year. According to the NYMRAD/RER Advertiser Revenue Report, banks and financial services increased their expenditures on radio from \$4.7 million in the first quarter of 1990 to \$6.3 million in the first quarter of 1991.

Banks increased their radio spending by 43.4% to \$3.87 million from \$2.7 million in 1990's first quarter; investment companies increased from \$619,951 to \$862,027, an increase of 43.4%; credit card/travelers check companies increased 150.6%, from \$260,225 to \$652,040; insurance companies lessened their expenditures on radio by 3.7%, from \$533,062 to \$513,151, and finance companies also reduced their expenditures compared to the first quarter of 1990 from \$584,354 to \$403,241.

NAB NOMINEES FOR MARCONI RADIO AWARDS

Nominees for the National Association of Broadcasters' Marconi Radio Awards were announced by the NAB last week. Winners will receive the awards at the Radio 1991 convention in San Francisco, Sept. 14.

Finalists in the personality of the year category in major markets are: Jess Cain, WHDH(AM) Boston; Hudson & Harrigan, KILT-AM-FM Houston; Mark & Brian, KLOS-FM Los Angeles; J.P. McCarthy, WJR(AM) Detroit and Bruce Morrow, WCBS-FM New York.

In large markets: Gary Burbank, WLW(AM) Cincinnati; Charlie Douglas, WSM(AM) Nashville; Eddie Haskell, WXLK-FM Roanoke, Va.; Brother Wease, WCMF-FM Rochester, N.Y., and Doug Wright, KSL(AM) Salt Lake City. In medium markets: Bill Barrett, KUGN(AM) Eugene, Ore.; Jerry Carr, WMT(AM) Cedar Rapids, Iowa; Mark Evans, WJHI(AM) Fort Wayne, Ind.; Tom Kinard, WJMX(AM) Florence, S.C., and C.C. Ryder, KBFX(AM) Anchorage.

In small markets: Joe Crystall, KGVY(AM) Green Valley, Ariz.; Todd James, WAGE(AM) Leesburg, Va.; Don Munson, WJBC(AM) Bloomington, Ill.; Bill O'Brian, KRKT-AM-FM Albany, Ore., and Stan Swol, KZZR(AM) Burns, Ore.

Personalities of the year in the network/syndication category are: Paul Harvey, ABC Radio Networks; Bob Kingsley, ABC Radio Networks; Rush Limbaugh, EFM Media; Charles Osgood, CBS Radio Networks; Bruce Williams, Westwood One.

REST OF BIRCH

Birch Scarborough of Coral Springs, Fla., released the results of

its spring 1991 survey for seven of the top 10 markets two weeks ago (BROADCASTING, June 17). Last week, numbers for Detroit, Dallas-Fort Worth and Houston were released (figures are for persons 12-plus, Monday-Sunday, 6 a.m.-midnight).

Station Format Winter '91 Spring '91

8. DALLAS-FORT WORTH

KSCS(FM)	Country	10.9	11.0
KPLX(FM)	Country	6.9	7.2
KKDA-FM	Urban	7.3	7.0
KTXQ(FM)	AOR	5.0	6.4
KVIL-AM-FM	AC	6.2	5.1
KEGL(FM)	CHR	4.4	4.9
KJMZ(FM)	Urban	4.9	4.9
WBAP(AM)	Country	4.6	4.3
KRLD(AM)	News	5.3	4.0
KHYI(FM)	CHR	3.8	3.8

10. HOUSTON

KIKK-FM	Country	9.0	10.0
KLOL(FM)	AOR	7.3	7.6
KMJQ(FM)	Urban	9.1	7.1
KILT-FM	Country	8.4	6.8
KHMX(FM)	Mix	5.2	5.3
KKBQ-FM	CHR	5.8	4.6
KZFX(FM)	Classic Rock	3.4	4.5
KODA(FM)	AC	3.0	4.2
KRBE-FM	CHR	4.0	4.2
KTRH(AM)	News	4.8	4.0

6. DETROIT

WJLB(FM)	Urban	7.2	8.8
WHYT(FM)	CHR	6.5	7.3
WJR(AM)	MOR/News/Talk	7.9	7.0
WLLZ((FM)	AOR	3.3	5.9
WWW(FM)	Country	5.3	5.1
WJZZ(FM)	Jazz	6.4	4.8
WRIF(FM)	AOR	4.3	4.7
WDFX(FM)	CHR	5.9	4.6
WKQI(FM)	CHR	3.8	4.5
WCSX(FM)	Classic Rock	3.8	4.4

RENEWED TV NETWORK, STATION GROWTH AHEAD

Study suggests broadcasting's current problems are mostly cyclical, not structural

Forecasting an industry future that some may find surprisingly rosy, the media brokerage and investment firm, Veronis, Suhler & Associates, last week released its fifth annual five-year forecast. The report, "Communications Industry Forecast" said industry revenue from 1991 through 1995 will increase at a compound annual growth rate of 6.8%, with the advertising portion of that increasing at a 6.1% rate, and the "end-user" portion—including cable and periodical subscriptions, home video rentals and film box office—increasing at a 7.4% rate.

A basic theme of the report is that many of the industry's current problems are "cyclical rather than structural," said Arthur Gruen, of Wilkofsky & Gruen, the New York-based economic consulting firm that helped produce the 216-page report. Gruen said the current recession is masking industry strength in a number of areas, including a rebound in national advertising spending from previously depressed levels.

COMMUNICATIONS INDUSTRY FORECAST

Industry segment	1985-90 compound annual growth (%)	1990 gross expenditures (\$ million)	1990-95 compound annual growth (%)
TELEVISION BROADCASTING	5.2%	\$25,490	6.0%
TV Networks	4.1%	9,845	6.5
TV Stations	6.0	15,645	5.8
RADIO BROADCASTING	6.2	8,765	6.6
Radio Networks	6.3	495	5.6
Radio Stations	6.2	8,270	6.7
CABLE TELEVISION	13.2	15,115	8.2
Advertising	19.8	1,790	12.2
Subscriptions	12.4	13,325	7.6
FILMED ENTERTAINMENT	15.6	25,712	8.3
Box Office	6.0	5,922	6.7
Home Video	32.7	10,900	9.2
Television Programs	9.4	8,640	7.8
Barter Syndication	17.2	1,150	9.6
TOTAL ADVERTISING	5.7	83,398	6.1
GNP	6.4	5,463,600	6.4

Above estimates are from Veronis, Suhler and Associates and Wilkofsky Gruen Associates.

VS&A expects that real GNP (which will decline 1% in recession-marked 1991) will slowly pick up next year by

1.5%, followed by increases over the next three years of 3.5%, 6% and 3.5%. Inflation over the same five years is projected to average 3.7%, down slightly from the 4% of the prior five-year period.

One communications area not as badly hurt by current economic difficulties is the marketing strategy involving promotion, incentives and couponing. The report notes that such areas are "more directly tied to sales," and thus easier to justify during advertiser cost cutting.

However, the end of both the recession, and of financial and corporate restructuring among national advertisers will lead to a shift in strategy "toward long-term brand awareness," said VS&A. That shift should benefit the broadcast television networks despite continuing losses in viewership to cable and home video. Including Fox, the broadcast television networks are projected to grow at a 6.5% rate, to \$13.5 billion compared to the 4.1% they registered during 1986-1990. VS&A President John Suhler said there is still no practical alternative to the reach and coverage provided to an advertiser by an affiliate station or network.

Continued restructuring of the retail sector will hinder local advertising growth in the short term, and thus hinder the growth of TV stations, which are more locally oriented. The rate of growth of local advertising on stations—



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As the economic doldrums continue, the government is looking everywhere for new income sources. One of the newest? Your radio station! Unexpected "civil monetary penalties" totaling hundreds of thousands of dollars now may be levied on you by the FCC.

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SMITHWICK & BELENDIUK, P.C.

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Continued on page 49.

CHANGING HANDS

This week's tabulation of station and system sales (\$250,000 and above)

WAVA(FM) Arlington (Washington), Va.
 □ Sold by Emmis Broadcasting to Salem Communications for \$20 million. **Seller** is headed by Jeff Smulyan and Steve Crane, and owns one AM and six FM's. **Buyer** is headed by Edward G. Atsinger III and Stuart W. Epperson, and owns 10 AM's and seven FM's. They also head Grapevine Radio Inc., which recently purchased KGEO(AM)-KGFM(FM) Bakersfield, Calif. ("Changing Hands," June 17). WAVA has contemporary hit format on 105.1 mhz with 50 kw and antenna 500 feet. **Broker** (for buyer): Media Venture Partners.

WSTE(TV) Ponce, P.R. Sold by Channel 7 Inc. to Siete Grand Television Inc. for \$6 million cash. **Seller** is 80% owned by Malrite Communications, headed by Milton Maltz, and 20% by Lucas Thomas Muniz. Malrite owns four AM's six FM's and five TV's (seller is also purchasing WLIH(TV) Ponce and WSUR-TV Caguas, both Puerto Rico). **Buyer** is headed by Jerry B. and Esther Hartman, husband and wife. Hartman is vice president at Prudential Securities and Florida land developer. WSTE is independent on ch. 7 with 166 kw vis., 22.4 kw aur. and antenna 2,710 feet.

WZTR(FM) Milwaukee □ Sold by MyStar Communications Corp. to Shockley Communications Corp. for \$4.9 million. Price includes \$4.4 million cash and \$500,000 promissory note. **Seller** is headed by Michael S. Maurer, and also owns WTPI(FM) Indianapolis. **Buyer** is headed by Terry

and Sandra Shockley, husband and wife, and also owns WOLX-FM Baraboo (Madison), Wisc., and KDA-AM-FM Duluth, Minn. WZTR has oldies format on 95.7 mhz with 34 kw and antenna 610 feet. **Broker**: Thoben Van Huss and Associates.

KXDC-AM-FM Monterey-Carmel, Calif.
 Sold by Western Media Group Corp. to Joaquin Financial Group Inc. for \$1.1 million. Stations were purchased in 1988 for \$2.65 million ("Changing Hands," November 28, 1988). Price includes \$50,000 escrow deposit, \$200,000 cash at closing and \$850,000 note payable at 9%. **Seller** is headed by Thomas K. Scallen, who heads International Broadcasting Corp., which owns Globetrotters and Ice Capades. **Buyer** is headed by by Jim Heidebrecht, and is investment group with no other broadcast interests. KXDC(AM) is fulltimer with easy listening format on 630 khz and 1 kw. KXDC-FM has easy listening format on 101.7 mhz with 800 w and ant. 590 feet.

WKZZ(FM) Lynchburg, Va. □ Sold by Lynchburg Independent Broadcasters Inc. to CEBE Investments Inc. for \$450,000 cash at closing. **Seller** is subsidiary of Bahakel Communications Ltd., owned by Cy N. Bahakel, and is licensee of seven AM's, seven FM's and eight TV's. **Buyer** is headed by Aylett B. Coleman and is licensee of WXLK(FM) Roanoke, Va. Coleman also owns WJQI Inc., licensee of WJQI-AM-FM Chesapeake-Virginia Beach, Va. WKZZ has CHR format on 100.1 mhz with 730 w and antenna 646 feet.

WGTX(AM)-WQUH(FM) De Funiak Springs, Fla. □ Sold by Kudzu Broadcasting Partnership to Sonic Enterprises Inc. for \$450,000 cash. **Seller**, headed by Paul H. Reynolds, Stephen G. McGowan (a proposed assignee) and William M. Gunter, is also selling WTID(FM) Reform, Ala. Reynolds, McGowan and Gunter have interests in WJAM-FM Marion, Ala. McGowan also has interests in WESP(FM) Dothan and is permittee of new FM at Uniontown, both Alabama. **Buyer** is headed by McGowan (50%) and Charles H. Chapman II (50%). Chapman is 25% partner of Broadcast Associates, licensee of WESP(FM) Dothan, Ala., and 50% owner of Transmit Enterprises Inc., proposed assignee of WTID(FM) Reform, Ala. WGTX has religious format on 1280 khz with 5 kw day. WQUH has AC format on 103.1 mhz with 2.6 kw and antenna 350 feet.

KWEY(AM)-KBXR(FM) Weatherford, Okla.
 □ Sold by Western Plains Broadcasting Inc. to Wright Broadcasting Systems Inc. for \$407,435. Price includes \$50,000 cash

CLOSED!

The sale of KXXR-FM, Kansas City, Missouri from a subsidiary of Olympia Broadcasting Corporation to Capital Broadcasting, Inc. for \$2,600,000.

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PROPOSED STATION TRADES

By volume and number of sales

—Last Week:

AM's □ \$822,000 □ 7
 FM's □ \$25,550,000 □ 4
 AM-FM's □ \$3,057,435 □ 2
 TV's □ \$6,000,000 □ 1
 Total □ \$35,429,435 □ 14

Year to Date:

AM's □ \$47,860,668 □ 120
 FM's □ \$112,713,772 □ 127
 AM-FM's □ \$129,107,587 □ 94
 TV's □ \$264,499,000 □ 39
 Total □ \$554,181,027 □ 380

For 1990 total see Jan. 7, 1991 BROADCASTING.

at closing; \$49,610.66 promissory note at 7.75% payable over five years, and \$307,825 promissory note at 7.75% payable in 12 years. **Seller** is headed by Alene Griffin and Richard Johnson, has no other broadcast interests. **Buyer** is headed by G. Harold Wright Jr. (80%) and Glenn H. Wright (20%), son and father. G. Harold Wright is president, GM and holds 33.3% interest in Anadarko Broadcasting Company Inc., licensee of KRPT-AM-FM Anadarko, Okla. KWEY has C&W format on 1590 khz with 1 kw day. KBXR has adult contemporary format on 97.3 mhz with 760 kw and antenna 385 feet.

WHKP(AM) Hendersonville, WTYN(AM) Tryon and WPNF(AM) Brevard, all North Carolina □ Sold by Kermit Edney to Arthur V. Cooley for for \$300,000 in transfer within licensee Radio Hendersonville Inc. Cooley is purchasing 51% of outstanding shares of licensee for \$153,000; licensee's Employee Stock Ownership Trust will purchase remaining 49% for \$147,000. **Seller** has no other broadcast interests. **Buyer** is former GM of station, and has no other broadcast interests. WHKP is fulltimer with MOR format on 1450 khz and 1 kw. WTYN has MOR format on 1160 khz with 10 kw day and 500 kw night; WPNF is fulltimer with MOR format on 1240 khz with 1 kw.

For other proposed and approved sales see "For the Record," page 62.

INDUSTRY FORECAST

Continued from page 46

only 3.2% in 1990—is expected to remain slow for the next two years.

Overall, TV stations are projected to record revenue growth at a slower 5.8% compound annual rate, which would put them at \$20.7 billion by 1995. That compares to a 6% growth rate over the previous five years.

The growth rate for the cable industry during the next five years will decline from the 13.2% recorded in 1985-1990, said VS&A. During the five years ending in 1995, the subscription component is estimated to grow by 7.6% annually, to \$19.2 billion, while VS&A projects advertisers will increase their spending to \$3.2 billion by 1995, an annual compound growth of 12.2%. Gruen said this year's report does not anticipate a strong impact from pay-per-view: "We still need to see whether pay-per-view can evolve from being more than the occasional championship fight."

In 1990 cable passed 86% of the 92.1 million television households, according to the study, with a penetration level of 55.7%. By 1995, the study forecasts cable will pass 86.7% of the total 97.9 million television households, with pen-

etration of 60.6%.

Suhler categorized radio broadcasting as the most "durable and versatile," and said that while it will continue to lose in-home use to other media, it will maintain its status as the exclusive out-of-home medium. The loss of listeners from AM to FM seems to have leveled off as well, said Suhler, with the study putting AM's share of audience at approximately 23.1%.

Advertising on radio stations is expected to increase at a compound annual rate of 6.7% between 1990 and 1995 (\$8.3 billion to \$11.4 billion). Spending on network radio will grow at the slower rate of 5.6%, reaching \$650 million by 1995, up from \$500 million in 1990.

The rate of growth of television program expenditures should decrease during the current five-year period, said VS&A, as TV networks and stations have less room to moderate other expenditures than they did five years ago. By 1995 VS&A forecasts that the TV networks will spend \$6.8 billion on programming, compared to \$2.5 billion spent by TV stations, \$3.4 billion by cable networks and \$1.8 billion by barter syndication.

-LC,GF

STOCK INDEX (CONT.)

	Closing Wed Jun 19	Closing Wed Jun 12	Net Change	Percent Change	P/E Ratio	Market Capitalization (000,000)
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EQUIPMENT & MANUFACTURING

N (MMM) 3M	96	1/8	93	1/4	2	7/8	03.08	16	21,131
N (ARV) Arvin Industries	25	1/2	23		2	1/2	10.86	19	479
O (CCBL) C-Cor Electronics	6	1/8	5	3/4		3/8	06.52	612	27
O (CTEX) C-Tec Corp.	14	1/4	13	3/4		1/2	03.63	-18	234
N (CHY) Chyron		5/16		5/16			00.00		3
A (COH) Cohu	10	5/8	10	3/8		1/4	02.40	8	20
N (EKE) Eastman Kodak	40	1/4	41	3/8	-1	1/8	-02.71	18	13,066
N (HRS) Harris Corp.	27	3/4	26	1/2	1	1/4	04.71	39	1,079
N (IV) Mark IV Indus.	12	7/8	12	7/8			00.00	7	183
O (MATT) Matthews Equip.	3	7/8	4	1/4	-	3/8	-08.82	193	23
O (MCDY) Microdyne	10	1/4	10	5/8	-	3/8	-03.52	-15	41
O (MCOM) Midwest Comm.		1/8		3/8	-	1/4	-66.66		0
N (MOT) Motorola	64	1/2	63	1/2	1		01.57	17	8,494
A (PPI) Pico Products		3/4		3/4			00.00		2
N (SFA) Sci-Atlanta	13	1/8	13	5/8	-	1/2	-03.66	8	296
N (SNE) Sony Corp.	43	3/8	43	1/4		1/8	00.28	21	14,397
N (TEK) Tektronix	25		24	1/2		1/2	02.04	-23	728
N (VAR) Varian Assoc.	46	1/8	46	1/4	-	1/8	-00.27	104	873
O (WGNR) Wegener	1	1/8	1	3/8	-	1/4	-18.18	-2	8
N (ZEN) Zenith	6	7/8	7	1/4	-	3/8	-05.17	-2	200

	Closing Wed Jun 19	Closing Wed Jun 12	Net Change	Percent Change	P/E Ratio	Market Capitalization (000,000)
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SERVICE

O	(AFTI) Am. Film Tech.	4	1/2	5	-	1/2	-10.00	48	
O	(BSIM) Burnup & Sims	7		6 7/8		1/8	01.81	-21	88
A	(CLR) Color Systems	3	1/2	3 5/8	-	1/8	-03.44	-4	36
N	(CQ) Comsat	29	7/8	30 3/8	-	1/2	-01.64	-33	558
N	(CDA) Control Data	11	1/8	11 5/8	-	1/2	-04.30	92	473
N	(DNB) Dun & Bradstreet	47	3/8	47		3/8	00.79	17	8,462
N	(FCB) Foote Cone & B.	26		26			00.00	12	283
O	(GREY) Grey Adv.	141		153		-12	-07.84	12	159
O	(IDBX) IDB Commun.	9	1/4	8 3/4		1/2	05.71	84	58
N	(IPG) Interpublic Group	42	3/4	44 1/2	-	1 3/4	-03.93	18	1,570
N	(OMC) Omnicom	29		27 3/4	1	1/4	04.50	14	813
O	(RTRSY) Reuters	38	5/8	41 3/4	-	3 1/8	-07.48	13	16,754
N	(SAA) Saatchi & Saatchi	15/16		15/16			00.00		148
O	(TLMT) Telemation		1/4	1/4			00.00		1
O	(TMCI) TM Century	7/32		3/16		1/32	16.66		4
A	(UNV) Unitel Video	8	5/8	8 3/4	-	1/8	-01.42	11	13
O	(WPPGY) WPP Group	4	1/2	4 7/8	-	3/8	-07.69	1	184

Standard & Poor's 400	447.34	448.76	-1.42	-0.4%
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RATINGS ROUNDUP

	7:00 PM	7:30 PM	8:00 PM	8:30 PM	9:00 PM	9:30 PM	10:00 PM	10:30 PM
MONDAY 6/10	ABC 7.2/13		MACGYVER (50) 7.5/16	[8.1/16] 8.8/17	ABC MONDAY NIGHT MOVIE—TWIN PEAKS (59) 6.5/11	[6.7/12] 6.4/11	6.8/12	7.0/13
	CBS 10.8/20		MAJOR DAD (37) 9.4/20	FAMILY MAN (40) 9.3/18	MURPHY BROWN (11) 12.0/21	DESIGNING WOMEN (11) 12.0/20	NORTH EXPOSURE (20) 11.1/19	[10.9/19] 10.7/20
	NBC 9.7/18		FRESH PRINCE (37) 9.4/20	BLOSSOM (47) 8.5/16	NBC MONDAY NIGHT MOVIE—ORIGINAL SIN (27) 9.1/16	[10.1/18] 9.9/17	10.6/18	10.8/20
	FOX 6.7/12		FOX NIGHT AT THE MOVIES—THE SITTER (59) 5.8/12	[6.7/12] 6.7/13	7.0/12	7.3/12		
TUESDAY 6/11	ABC 11.3/21		WHO'S THE BOSS (20) 10.9/22	HEAD OF THE CLASS (25) 10.5/20	ROSEANNE (2) 14.8/27	COACH (5) 13.1/23	CHINA BEACH (40) 9.8/17	[9.3/17] 8.9/17
	CBS 11.0/20		RESCUE 911 (7) 11.7/23	12.5/24 13.4/25	CBS TUESDAY NIGHT MOVIE—BRIDESMAIDS (26) 9.1/16	[10.2/18] 9.9/17	11.1/20	10.9/20
	NBC 11.3/21		MATLOCK (33) 9.4/19	[9.9/19] 10.5/20	HEAT OF THE NIGHT (6) 12.0/22	[12.8/23] 13.6/24	LAW AND ORDER (15) 11.4/20	[11.3/21] 11.1/21
WEDNESDAY 6/12	ABC 7.3/13		WONDER YEARS (52) 7.7/15	GROWING PAINS (43) 9.1/17	DOOGIE M.D. (31) 10.0/18	INTERNATIONAL ROCK AWARDS (69) 6.3/11	[5.6/10] 5.3/9	5.2/10
	CBS 8.9/16		RESCUE 911 SP. (57) 7.0/14	FAMILY MAN (65) 5.8/11	JAKE AND FAT MAN (27) 9.4/17	[10.1/18] 10.7/19	48 HOURS (27) 10.6/19	[10.1/18] 9.5/18
	NBC 16.4/31		UNSLVD. MYSTERIES (7) 11.6/24	[12.5/25] 13.4/27	NBA FINALS GAME 5—BULLS VS. LAKERS (1) 14.6/27	[19.7/36] 18.1/32	19.3/34	21.5/39
THURSDAY 6/13	ABC 8.0/15		MORRIS STALUTES (58) 6.7/14	[6.9/14] 7.1/14	GABRIEL'S FIRE (61) 6.1/11	[6.5/12] 6.8/12	PRIMETIME LIVE (24) 10.8/20	[10.6/20] 10.4/20
	CBS 7.2/14		TOP COPS (51) 7.2/15	[7.8/16] 8.5/17	BROKEN BADGES SP. (63) 6.3/12	[6.3/12] 6.2/11	ROBIN HOOD MYTH, MAN, MOVIE (53) 7.7/14	[7.6/15] 7.6/15
	NBC 10.9/21		COSBY (31) 10.0/21	DIFFERENT WORLD (22) 10.8/22	CHEERS (3) 13.8/26	SEINFELD (13) 11.9/22	L.A. LAW (37) 9.0/17	[9.4/10] 9.7/19
	FOX 7.1/14		SIMPSONS (48) 8.3/18	BABES (69) 5.6/11	BEVERLY HILLS 90210 (56) 6.7/13	[7.3/14] 7.9/14		
FRIDAY 6/14	ABC 11.4/25		FULL HOUSE (15) 11.3/27	FAMILY MAT. (10) 12.1/28	PERFECT STRGN. (18) 11.1/24	GOING PLACES (36) 9.5/20	20/20 (9) 12.2/25	[12.3/25] 12.5/26
	CBS 6.6/14		GUNS OF PARADISE (75) 4.9/12	[5.0/12] 5.2/12	CBS FRIDAY NIGHT MOVIE—FEAR STALK (54) 6.5/14	[7.4/15] 7.6/16	7.5/15	7.9/16
	NBC 4.7/10		HUNTER (79) 4.5/11	[4.5/11] 4.5/10	MIDNIGHT CALLER (77) 4.0/9	[4.8/10] 4.9/10	5.1/10	5.2/11
	FOX 4.3/10		AMERICA'S MOST WANTED (71) 5.2/12	[5.4/13] 5.6/13	ALLIEN NATION * (88) 3.2/7	[3.1/7] 3.1/6		
SATURDAY 6/15	ABC 5.5/12		YOUNG RIDERS (74) 4.8/12	[5.1/12] 5.3/13	ABC SATURDAY NIGHT MOVIE—FLAMINGO KID (67) 5.0/11	[5.7/12] 5.2/11	6.0/13	6.6/15
	CBS 5.4/12		CBS SATURDAY NIGHT MOVIE—MONEY, POWER, MURDER (65) 5.8/14	[5.0/13] 5.9/14	5.6/12	5.6/12	DOCTOR (78) DOCTOR 4.6/10	GOOD SPORTS (81) 4.3/9
	NBC 8.9/20		AMEN (64) 6.1/15	AMER. DREAM. (62) 6.4/15	GOLDEN GIRLS (19) 11.0/24	EMPTY NEST (14) 11.5/24	SISTERS (40) 9.3/20	[9.3/20] 9.2/20
	FOX 3.7/9		TLY. HD. (86) VIDEO 3.9/10	YEAR-BOOK (90) 2.5/6	COPS (85) 4.0/9	COPS 2 (79) 4.5/10		
SUNDAY 6/16	ABC 7.8/16	LIFE GOES ON (81) 4.0/10	[4.3/10] 4.6/11	AMR. FUN (35) VIDEO 9.7/21	AMR. FUN (34) PLP. 9.8/20	ABC SUNDAY NIGHT MOVIE—BEST FRIENDS (46) 7.7/15	[8.6/16] 8.8/16	9.0/17 8.9/18
	CBS 10.8/22	60 MINUTES (4) 12.1/30	[13.2/32] 14.3/33	SUNDAY DINNER (45) 8.8/19	ALL IN THE FAMILY (22) 10.8/22	MURDER SHE WROTE (17) 10.7/20	[11.2/21] 11.8/22	TRAILS OF ROSIE (44) 9.1/17
	NBC 6.0/12	EVERETT KOOP * (89) 2.8/7	[2.7/6] 2.5/6	EXPOSE (84) 4.1/9	REAL LIFE (76) J.P. 4.9/10	NBC SUNDAY NIGHT MOVIE—REVEALING EVIDENCE (48) 6.8/13	[8.3/16] 7.7/14	9.2/17 9.6/19
	FOX 5.9/12	TRUECLIF (87) 3.8/9	P. LEWIS (83) 4.2/10	IN LIVING COLOR (54) 7.4/16	GET A LIFE (71) 5.4/11	MRD. WITH CHILD. (27) 10.1/19	BACKSTAGE PASS (67) 5.7/10	SUNDAY COMICS (71) 5.3/10

WEEKLY PRIME TIME AVERAGE	ABC 8.3/16	CBS 8.8/17	NBC 9.5/19	FOX 5.6/12	YELLOW = 1/2 HR WINNER
SEASON PRIME TIME AVERAGE	ABC 11.9/20	CBS 11.9/20	NBC 12.3/21	FOX 6.3/11	*—PREMIERE
NIGHTLY RATING / SHARE	(88)—RANKING	(88)—PROGRAM RATING / SHARE	HALF-HOUR RATING / SHARE	SOURCE: A.C. NIELSEN	

L910416EB; 850 khz; 2.5 kw-D; FM: BALH910416EC; 105.5 mhz; 3 kw; ant. 300 ft.—Granted assignment of license from Crystal Lake Radio Ltd. to Pride Communications Ltd. for \$2.2 million. **Seller** is headed by Gerald T. Vento, and has no other broadcast interests. **Buyer** is headed by Jim Hooker (100% stockholder), Pride Communications Inc. (20% P) and Don Johnston (16% P), and has no other broadcast interests. Action May 31.

■ **KSCB-AM-FM Liberal and KEDD(AM) Dodge City, both Kansas** (KSCB[AM]: BTC910422EB; 1270 khz; 1 kw-D; 500 w-N; KSCB[FM]: BTCH910422EC; 107.5 mhz; 100 kw; ant. 511 ft.; KEDD[AM]: BTC910422ED; 1550 khz; 1.00 kw-D)—Granted transfer of control from Theo C. Landon, executrix of estate of Alf M. Landon to Theo C. Landon for no cash consideration. Theo Landon is principal of Seward County Broadcasting Co. Inc., licensee, and has no other broadcast interests. Action June 3.

■ **WOCB-AM-FM West Yarmouth, MA** (AM: BAL910410GR; 1240 khz; 1 kw-U; FM: BALH910410GS; 94.9 mhz; 50 kw; ant. 300 ft.)—Granted assignment of license from Patch-Dunn Association of Cape Cod, debtor-in-possession, to Boch Broadcasting Ltd. for \$825,000. Sale for stations in August, 1990 for \$2.47 million to U.S. Media Group Inc. was not approved ("For the Record," Aug. 13, 1990). **Seller** is headed by Kenneth Patch, and has no other broadcast interests. **Buyer** is headed by Boch Broadcasting Corp. (GP) and Ernest J. Boch (LP), and has no other broadcast interests. Action May 31.

■ **WACY(AM) Fenton, MI** (BAL910318ED; 1160 khz; 1 kw-U)—Granted assignment of license from Deano Day Enterprises Ltd. to Statewide Broadcasting Systems Inc. for \$600,000. **Seller** is headed by Deano Day, who is forming new company which will purchase station. **Buyer** is headed by Day (30%), Edward Derbabin (30%), William Wilcher (30%) and Mitchell D. Moen (10%), who is son of Day. Statewide has filed concurrent application for assignment of WELL (AM) Battle Creek and WELL(FM) Albion, both Michigan, from Triad Communications ("For the Record," April 22). Action June 4.

■ **WAAH(FM) Houghton, MI** (BALH891003HL; 102.3 mhz; 3 kw; ant. 328 ft.)—Dismissed app. of assignment of license from WAAH Acquisition Partnership to Yupper Broadcasting for \$400,000. **Seller** is headed by Eugene White and Ralph Savage and has no other broadcast interests. **Buyer** is headed by Ronald McCarter and has no other broadcast interests. Action May 30.

■ **KGHL(AM)-KDX(FM) Billings, MT** (AM: BAL910412EA; 790 khz; 5 kw-U; FM: BALH910412EB; 98.5 mhz; 85 kw; ant. 370 ft.)—Granted assignment of license from Sunrise-Montana Inc. to Pegasus Broadcasting of Billings Inc. for \$1 million. ("Changing Hands," April 15). **Seller** is headed by Dick Elliott, and has no other broadcast interests. **Buyer** is headed by PBMI Holdings Co. (100% VS), Dan Snyder and Christopher J. Brennan. PBMI Holdings is licensee of KCAP(AM)-KZMT(FM) Helena, MT. Action May 31.

■ **KRNY(FM) Kearney, NE** (BTCH910422HV; 102.3 mhz; 3 kw; ant. 300 ft.)—Granted transfer of control within Nebraska Media Concepts Inc. for \$72,000. **Seller** is Polly A. Hays, and has no other broadcast interests. **Buyer** is H. Dale Sostad, and has no other broadcast interests. Action June 5.

■ **KHIT(AM)-KIQ(FM) Sun Valley-Reno, NV** (AM: BAL910411EB; 1590 khz; 5 kw-D; FM: BALH910411EC; 1045 mhz; 25 kw; ant. 2,930 ft.)—Granted assignment of license from Media Venture Management Inc. to Radio Reno Inc. for \$1 million ("Changing Hands," April 8). **Seller** is headed by Randy George, receiver; George is also receiver for KXGO(AM) Arcata, CA. **Buyer** is headed by Kenneth V. (38%) and Jerry L. Miller (38%), brothers, and Robert M. Salmon (19%) and Karen Wolfe (5%), who own Radio Associates Inc., licensee of KMIX-AM-FM Turlock and KEVB(FM) Redding, both California. Action June 4.

■ **KRUI(AM) Ridoso Downs and KWW(FM) Maljamar, both New Mexico** (AM: BTC900920EA; 1490 khz; 1 kw-L; FM: BTCH900920EB; 105.1 mhz; 100 kw; ant. 1,180 ft.)—Granted transfer of control

from Woodrow Michael Warren to AFG Industries Inc. for \$100,000. **Seller** has no other broadcast interests. **Buyer** is headed by R.P. Hubbard and has no other broadcast interests. Action June 4.

■ **WCLN-AM-FM Clinton, NC** (AM: BAL910424EL; 1170 khz; 5 kw-D; FM: BALH910424EJ; 107.1 mhz; 3 kw; ant. 300 ft.)—Granted assignment of license from Sampson Broadcasting Co. to Willis Broadcasting Co. for \$650,000. **Seller** is headed by Lawrence B. Carr and has no other broadcast interests. **Buyer** is headed by L.E. Willis Sr., and has interests in KDFT(AM) Ferris, TX; KLRG(AM) North Little Rock, KFTH(FM) Marion, KMZX(FM) Lonoke and KSNE(FM) Marshall, all Arkansas; WAYE(AM) Birmingham, WSFU-FM Union Springs and WVCA(FM) Selma, all Alabama; WBOK(AM) New Orleans; WESL(AM) East St. Louis, IL; WGSP(AM) Charlotte, WBXB(FM) Edenton, WKJA(FM) Belhaven, WVRN(AM) Warren and WSRG(AM) Durham, all North Carolina; WIMG(AM) Ewing, NJ; WPCE(AM) Portsmouth and WMXS(FM) Cape Charles, both Virginia; WTJH(AM) East Point, GA; WURD(AM) Philadelphia; WWCA(AM) Gary and WPZZ(FM) Franklin, both Indiana, and WKSO(FM) Orangeburg, WKWQ(FM) Batesburg and WWPB(FM) Marion, all

South Carolina. Action June 6.

■ **WHKY-AM-TV Hickory, NC** (AM: BTC910401KJ; 1290 khz; 5 kw-D; 1 kw-N; TV: BTCT910401KI; ch. 14; 656.1 kw-V; 125.3-A; ant. 600 ft.)—Granted transfer of control from Roberta S. (Susie) Long, executrix of estate of Edmund and Roberta S. Long to The Long Family Partnership for no financial consideration. Transferor has no other broadcast interests. Transferees are Thomas E.S. Long Sr. (58.17%) and Roberta S. (Susie) Long (40.85%), siblings, and Ella Lee Shufford (1.97%), and have no other broadcast interests. Action June 5.

■ **WYBH(FM) McConnellsville, OH** (BAPH910418HT; 100.9 mhz; 3 kw; ant. 91 ft.)—Granted assignment of CP from Trell Broadcasting Co. to Quiet Radio Inc. for \$7,671. **Seller** is headed by David L. Landefeld and has no other broadcast interests. **Buyer** is headed by John A. Wharf Jr. (100%) and is president and sole owner of WMOA(AM) Marietta, OH. Action June 4.

■ **KAGO-AM-FM Klamath Falls, OR** (AM: BTC910102EA; 1150 khz; 5 kw-D; 1 kw-N; FM: BTCH910102EB; 99.5 mhz; 26.5 kw; ant. 360 ft.)—Granted assignment of license from Key Broadcasting,

SUMMARY OF BROADCASTING & CABLE

BROADCASTING

SERVICE	ON AIR	CP's ¹	TOTAL ²
Commercial AM	4,986	241	5,227
Commercial FM	4,449	976	5,425
Educational FM	1,459	294	1,753
Total Radio	10,894	1,511	12,405
Commercial VHF TV	554	20	574
Commercial UHF TV	570	173	743
Educational VHF TV	124	3	127
Educational UHF TV	230	13	243
Total TV	1,478	209	1,687
VHF LPTV	201	163	364
UHF LPTV	694	903	1,597
Total LPTV	895	1,066	1,961
FM translators	1,860	348	2,208
VHF translators	2,712	87	2,799
UHF translators	2,312	320	2,632

CABLE

Total subscribers	53,900,000
Homes passed	71,300,000
Total systems	10,823
Household penetration ³	58.6%
Pay cable penetration	29.2%

* Includes off-air licenses. ¹ Penetration percentages are of TV household universe of 92.1 million. ² Construction permit. ³ Instructional TV fixed service. ⁴ Studio-transmitter link. Source: Nielsen and Broadcasting's own research.